CHASE Paymentech

Terminal Guide

VeriFone VX520, VX820 Duet and VX680 3G Retail & Restaurant

This Quick Reference Guide will guide you through understanding your terminal's functionality, and will help you with troubleshooting your payment application and terminals.

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VX520 | VX820 Duet | VX680 3G

KEY	Function
1	F1 – This is a variable key.
2	F2 – This is a variable key.
3	F3 – This is a variable key.
4	F4 – This is a variable key.

KEY	Function	
	VX520	VX820 Duet and VX680 3G
5	Arrow Key	Arrow Key
6	Tip Adjust	Tip Adjust
7	ALPHA	ALPHA
8	Gift Card	Gift Card
9	Reports	Reports

Key Functions

The chart below details the navigation from the main menus for the Verifone VX520, VX820 Duet and VX680 3G terminals.

Navigating Your Terminal

Refer to this section to find and begin the transaction or function you wish to use. Options may vary depending on the device you are using.

BEGIN A SALE

To begin a sale transaction, press **[F2]** (VX520) or **[F1]** (VX820 Duet and VX680 3G) to select Sale from the idle screen. Your terminal will guide you through the process.

BEGIN OTHER TRANSACTIONS

Use the **[↓]** (VX520) or **[ ]** (VX820 Duet and VX680 3G) key at the main menu or idle prompt to navigate to the transaction type you wish to perform. Scroll through the menu and press the corresponding **[F]** key when your desired transaction appears on the terminal display.

REPRINT A RECEIPT

The Reprint function is accessible through the main menu. Press **[↓]** (VX520) or **[ ]** (VX820 Duet and VX680 3G) to scroll, and select reprint. You will be prompted to select last receipt, or enter criteria to search for another receipt to reprint.

ACCESS CLERK/SERVER SETUP

At the main menu, press **[OK]** to access the Configuration menu. Then, navigate to the Clerk Setup or Server Setup option.

ACCESS REPORTS

Press **[Reports]** (VX520) or **[ ]** (VX820 Duet and VX680 3G) to access the Reports menu. Scroll to the desired report or report category, then press the corresponding **[F]** key and follow the prompts to view or print your report.

EDIT AUTO SHIFT TIMES

If you are in auto shift mode, use this procedure to edit the shift start and end times. Press **[1]** at the idle screen to access the Shift menu.

MANUAL SHIFT CLOSE

If you are in manual shift mode, use this procedure to close the current shift and start a new shift. Press **[1]** at the idle screen to access the Shift menu.

DOWNLOAD UPDATES*

Your terminal will automatically check for updates to its software every 60 days (default). If an update is available, the terminal will schedule a time to perform the automatic download. The terminal will not proceed with the download at the scheduled time if any transactions are left unsettled.

* To download automatic updates connect the VX680 3G terminal to a power supply overnight.

Available Transaction Types

Refer to this section for information on what transactions are available, when to use them, and how to begin the transaction.

Credit and Debit Transactions	VX520	VX820 Duet and VX680 3G
Sale A sale transaction using a credit or debit card; the card is present.	Press **[F2]** to select **Sale**.	Press **[F1]** to select **Sale**.
Return Perform a return to refund money to a cardholder's account from a credit or debit sale completed in a closed batch (i.e., previous day). May also be used to adjust a previous transaction.	Press **[↓]** to scroll, and select **Refund**.	Press **[F4]** to select **Refund**.
Void Perform a void to reverse a credit sale, force, or return transaction and prevent any funds from transferring from the cardholder's account. Only available for transactions in the current batch (i.e., same day).	Press **[F4]** to select **Void**.	Press **[F3]** to select **Void**.

Credit Only Transactions	VX520	VX820 Duet and VX680 3G
Force Perform a force sale when the terminal cannot reach the host (Chase Paymentech) to authorize a transaction, or to finalize a Pre-Auth transaction. Contact your voice authorization center for an authorization code, and then force the transaction.	Press **[↓]** and then select **Force**.	Press **[ ]** and then select **Force**.
Pre-Auth/Pre-Auth Completion (retail only) A pre-auth transaction provides an approval, but the consumer is not charged until a preauth completion is performed.	Press **[↓]** and then select **Pre-Auth**.	Press **[ ]** and then select **Pre-Auth**.
Open Tab (restaurant only) A preauthorization transaction for a specific, pre-determined dollar amount.	Press **[↓]** to scroll, and select **Tab > Open Tab**.	Press **[ ]** to scroll, and select **Tab > Open Tab**.
Close Tab (restaurant only) Perform to close the opened tab and place it in the settlement batch file.	Press **[↓]** to scroll, and select **Tab > Close Tab**.	Press **[ ]** to scroll, and select **Tab > Close Tab**.

Integrated Contactless Technology

Note: Tip functionality requires the card to be inserted or swiped.

CONTACTLESS PAYMENTS

Your VeriFone terminal automatically accepts contactless payments. During a sale transaction, the terminal will display the "Tap/ Insert/Swipe" prompt and the contactless symbol. At this time, customers with contactless-enabled cards should touch/tap their card on or in close proximity to the top of the terminal screen for a few seconds. Your terminal will process contactless payment transactions as if a card were swiped or inserted. As an added security measure, the terminal will prompt for a card insert or swipe if the transaction amount is over a pre-set threshold.

Clerk/Server Management	
Log On/Off Clerk/Server	Used to log on clerks/servers as their shifts begin, and log them off at the end of their shift.
Add Clerk/ Server	Adds new clerks or servers to your terminal. You will be prompted to create an ID and a password for each new clerk/server.
Modify Clerk/ Server	Allows modification of a clerk/ server's password.
Delete Clerk/ Server	Removes a single clerk/server from the terminal.
Available Transaction Types (cont.)	Your terminal supports various transaction types. Refer to this section for information on what transactions are available, when to use them, and how to begin the transaction.
Clerk/Server Setup	Accessible through the Configuration menu, clerk/server setup allows you to manage IDs and passwords. Press **[OK]** at idle, and select **Servers** or **Clerk Setup**, based on your terminal's configuration.

Clerk/Server Management

From the idle prompt, press the [OK] key to launch the Configuration menu. From this menu, select "Server Setup."

Gift Card Transaction Types (Optional)

If you are participating in Chase Paymentech's proprietary Gift Card program, your terminal supports various stored value card transaction types. Refer to this section for information on what gift card transactions are available and when to use them.

*Note: The **[Gift Card]** button is the third purple hot key from the left on the VX520 terminal or the [ ] icon on the VX820 Duet and VX680 3G terminals.*

Gift Card Transactions	VX520	VX820 Duet and VX680 3G
Issuance/Add Value Adds value to the gift card account. This transaction can be used to issue and activate a new card, or to reload an active card with incremental value.	Press **[Gift Card]**, then select **Issue Add Value**.	Press **[ ]**, then select **Issue Add Value**.
Activation/Block Activation Create a consumer's gift card account by assigning value to a card. One or more gift cards can be activated at one time. Activations can only be performed on cards that have not been previously activated.	Press **[Gift Card]**, press **[↓]** to scroll, and then select **Activation** or **Block Activate**.	Press **[ ]**, press **[ ]** to scroll, and then select **Activation** or **Block Activate**.
Redemption Decreases the value stored on the consumer's gift card account. This transaction is performed when a consumer uses the card to purchase goods or services.	Press **[Gift Card]**, then select **Balance Inquiry**.	Press **[ ]**, then select **Balance Inquiry**.
Force Perform a force redemption, activation or issuance when the terminal cannot reach the gift card host.	Press **[Gift Card]**, press **[↓]** to scroll, and then select Force Issuance or Force Redempt; or, press **[Arrow]** to scroll, and then select **Force Activate**.	Press **[ ]**, press **[ ]** to scroll, and then select **Force Issuance** or **Force Redempt**; or, press **[ ]** to scroll, and then select **Force Activate**.

Gift Card Transactions	VX520	VX820 Duet and VX680 3G
Add Tip A gift card redemption transaction for the amount of the tip	Press **[Gift Card]**, then press **[↓]** and select **Add Tip**.	Press **[ ]**, then press **[ ]** and select **Add Tip**.
Deactivation When enabled, change the status of a card from active to inactive. Inactive cards may not be used for redemptions.	Press **[Gift Card]**, press **[↓]** to scroll, and then select **Deactivation**.	Press **[ ]**, press **[ ]** to scroll, and then select **Deactivation**.
Reactivation When enabled, this transaction allows the merchant to change the status of a card from inactive to active. This transaction can only be used to activate "deactivated" cards.	Press **[Gift Card]**, press **[↓]** to scroll, and then select **Reactivation**.	Press **[ ]**, press **[ ]** to scroll, and then select **Reactivation**.

Available Reports

A report is like a snap shot in time of business activities. Use this data to help you make crucial business decisions.

*Note: The **[Reports]** button is the purple hot key on the far right on VX520 or the [ ] key on VX820 Duet and VX680 3G terminals.*

Reports: Main Menu	
Totals Report	Prints totals by card type and card issuer.
Detail Report	Prints detail information for each transaction.
Clerk/Server Reports	Launches Clerk or Server Reports Menu options. **(See Reports: Clerk/Server Reports Menu.)**
Batch Review	Launches Batch Review menu options. Allows access to view detail on all transactions in the current batch. This can be used to retrieve transactions in the current batch by entering search criteria. Once the transaction is retrieved, you may adjust or void the transaction. To access the Batch Review for all transactions, the Supervisor or Manager password level is required.
Batch History	Prints a series of settlement reports by date.
Host Totals	Runs the host totals transaction and prints a report. See Transaction section for description.
Terminal Reports	Launches Terminal Reports menu options. These reports are used by your Help Desk Associate to troubleshoot your terminal.
Outstanding Pre-Auth Report (retail only)	Prints the details or totals of the current open pre-auth transactions in the terminal.

Clerk/Server Reports Menu	
Totals Report	Prints totals by card type and card issuer.
Detail Report	Prints detail information for each transaction.
Shift Report	Prints transaction totals per shift.
Clerk/Server Table	Prints login and logout information.

Settling the Batch

Your transactions must be "settled" daily. Read this section to ensure the settlement process operates smoothly.

SETTLEMENT

A Settlement operation is used to close the current batch and open a new batch for logging and accumulating transactions.

Your VeriFone terminal uses a Host Capture System (HCS) application. In the HCS environment, all transactions are sent online to the Chase Paymentech Host and are captured at the moment they occur. This includes Returns, Auth / Force Sales, Voids and Reversals. Auth only transactions are not settled until they are completed or closed. There are three settlement options: Host Auto Close, Auto Settlement, and Manual Settlement.

1 – HOST AUTO CLOSE

If your terminal is set to Host Auto Close, the host will close the current open batch at a designated time each day. There is no end of day batch processing required from the merchant.

2 – MANUAL SETTLEMENT

If your terminal is configured to manually settle, navigate to **Settlement** from the main menu and follow the prompts displayed.

3 – TIMED AUTO SETTLEMENT**

If your terminal is set to Timed Auto Settlement, it will automatically settle transactions in the current batch at a specific, predetermined time, within a 24-hour period. When configured, auto settlement begins anytime after the set time occurs if there are transactions in the batch. For example, if auto settlement time is set to 22:30:00 (10:30 PM) then auto settlement occurs at approximately 22:30:00. If the terminal is turned off before the set time, and turned on again (usually the next morning), auto settlement occurs at that time.

** To perform a timed auto settlement connect the VX680 3G terminal to a power supply overnight.

Prompt Q&A

While navigating through transactions, you'll find that some prompts aren't as clear as others. This section clarifies those prompts.

Prompt	Description/Action
Imprint Card Press OK Key	May display while performing a manually entered transaction. Imprint the card using a manual imprint machine to prove the card was present during the transaction.
V-Code:	Enter the CVC (card verification code), typically the last 3 or 4 digits found on the back of the card on the signature line. CVC codes are designed to reduce payment card fraud.
Code Present? No [F1] Xread [F2]	Displays when V-Code prompt is bypassed. Select **X read** if the code is present, but unreadable.
Send Duplicate? Yes [F1] No [F2]	Displays when you are attempting a transaction with an account number and amount that has already been used in the current batch. Select **Yes** to confirm that this transaction should be processed. Select **No** to cancel the transaction.
Appr Code:	Displays during a Force transaction. Key in the approval code you received from the Voice Authorization Centre, and press **[OK]**.
Sel App [APPL 1] [F1] [APPL 2] [F2]	Select the desired application by pressing the corresponding **[F]** key.
Amt Due: x.xx Enter to Confirm	Press **[OK]** to continue with another transaction for the amount due.
Select Language English [F1] Français [F2]	Press the **[7]** key to specify whether the terminal will display prompts in English or French.

Error Code	Description	Action
Bad Account #	The card number being used for the current transaction does not pass the LUHN check.	Retry. If error persists, ask for another form of payment as the card may be fraudulent.
Empty Batch	Cannot perform requested function - batch is empty.	(No action.)
Expired card	The card's expiration date has passed.	Retry. If error persists, ask for another form of payment
Invalid Accnt No	The 4 digits keyed do not match the account number from the card's mag stripe.	Re-key the last 4 digits. If error persists, ask for another form of payment as the card may be fraudulent.
Invalid Srvr Id Invalid Clrk Id	The clerk/server number keyed has not been logged in.	Login the clerk/ server through Clerk/ Server Setup.
Void Not Allowed	The user tried to void an already voided transaction.	(No action.)

Common Error Codes

In the event that your terminal displays an error, refer to these error codes to troubleshoot your terminal. If the code you are experiencing is not shown, retry the transaction. To reduce chargeback risks and manage your processing costs, avoid keying transactions when the card is present. Instead, ask for another method of payment.

If the error persists, contact your Help Desk for support.

Chip Card Error Codes

In the event that your terminal displays a chip-related error, refer to these error codes to troubleshoot your terminal. If the code you are experiencing is not shown, retry the transaction. If the error persists, contact your Help Desk for support.

Error Code	Description	Action
Appl Not Supported	The application on the chip card is not supported.	Follow instructions on the terminal to complete the transaction.
Card Blocked	The chip card has been blocked.	Follow the instructions to complete the transaction. Refer the cardholder to the issuing bank.
Chip Card Failure	The chip card has failed to read properly	Attempt the transaction again. Obtain another form of payment.
Chip Card Failure, Use Mag Stripe	The chip card has failed to read properly.	Perform transaction by swiping the magnetic stripe.
Card Removed	The chip card has been removed while a transaction is being processed.	Attempt the transaction again.
Invalid CAPK File	The card has requested a file that does not match the terminal.	No action is required. If the error persists, contact the Help Desk.

Error Code	Description	Action
Last PIN Try	There is only one PIN attempt entry left on the card.	No action.
PIN Blocked	The PIN has been blocked on the chip card.	Follow instructions on the terminal to complete the transaction. Refer the cardholder to the issuing bank.
PIN Try Limit Exceeded	The PIN limit has been exceeded.	Follow instructions to complete the transaction. Refer the cardholder to the issuing bank.
Use Chip Reader	A chip-enabled card has been swiped but has not yet been inserted into the smart card reader.	Insert the card into the smart card reader.

Merchant Support

1.800.265.5158

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